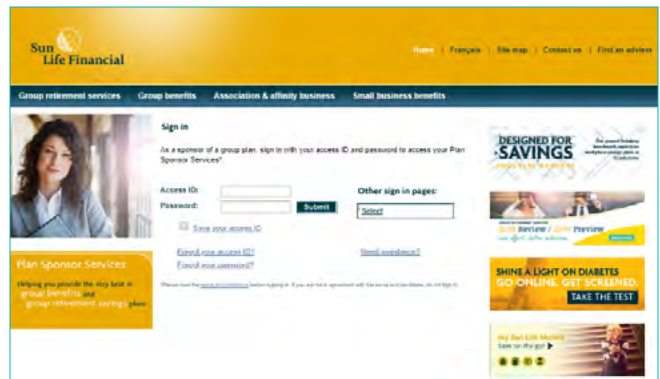


Enter member contributions through the Plan Sponsors Services website.
It's easy, safe and accurate – here's how it works:

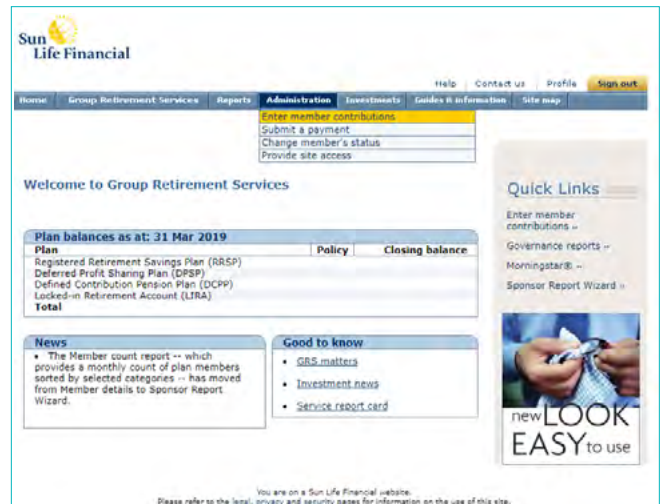
Step 1

Sign in to the Plan Sponsor Services website

- Sign in to the site at **SunLife.ca/sponsor** using your access ID and password.
- Select **Group Retirement Services**.



- Select **Enter member contributions** from the **Administration** dropdown menu.



Step 2

Select contribution set

- On the **Enter member contributions** screen, select **Enter a new set of contributions**.
- Select the payroll division (if applicable) and choose whether to sort your list of members by **Member Name** or **Member Number**.

Enter member contributions
Select Contribution Set [More information](#)

Input contributions directly into company plans. If you require help at any time, click on **More information**.

Step 1: Choose one of the following.

- Enter a new set of contributions
- Edit the draft set of contributions
- View a historical set of contributions
- Create a printable document for a contribution set.

Step 2: Select the payroll division (if applicable), and the way you wish to sort your list of members.

Select a Payroll Division:

Sort List of Members By:

Step 3: Select the set of member contributions to enter or edit, then click **Continue**.

| | |

[Continue](#)

Step 3

Select the set of member contributions to enter or edit

- Select **blank set** to create a new contribution set.
- OR
- From the dropdown list, select a recent contribution remittance that most closely matches the information in your current contribution file and edit where needed.

Enter member contributions
Select Contribution Set [More information](#)

Input contributions directly into company plans. If you require help at any time, click on **More information**.

Step 1: Choose one of the following.

- Enter a new set of contributions
- Edit the draft set of contributions
- View a historical set of contributions
- Create a printable document for a contribution set.

Step 2: Select the payroll division (if applicable), and the way you wish to sort your list of members.

Select a Payroll Division:

Sort List of Members By:

Step 3: Select the set of member contributions to enter or edit, then click **Continue**.

Contribution Period	Set Status	Confirmation #	Total \$
2018-09-31 - 2018-09-07	P	202930291100	4,500.00
2018-08-30 - 2018-09-07	P	202330561408	4,500.00
2018-08-27 - 2018-09-03	P	202727501100	6,000.00
2018-08-15 - 2018-08-30	P	203730590808	4,500.00
2018-08-12 - 2018-08-29	P	203829380908	3,500.00
2018-06-06 - 2018-06-13	P	201504062306	6,000.00
2016-05-31 - 2016-06-07	P	200630230005	6,000.00
2016-05-31 - 2016-06-07	P	203530030205	9,000.00
2016-05-29 - 2016-06-04	P	204127040605	6,000.00
2016-05-28 - 2016-06-04	P	205427130605	9,000.00
2016-05-27 - 2016-06-03	P	203826380905	6,000.00
2016-05-27 - 2016-06-03	P	205526541005	9,000.00
2016-04-21 - 2016-04-29	P	203029471304	200.00
2016-03-14 - 2016-03-21	P	200816160402	200.00
2015-08-19 - 2015-08-31	P	203130310910	200.00
2015-06-19 - 2015-06-30	P	203230420910	255.00
2015-06-12 - 2015-06-23	P	202012241406	700.00
2015-06-02 - 2015-06-10	P	203712161406	700.00
2015-06-01 - 2015-06-10	P	20321501106	700.00

| | |

[Continue](#)

Step 4

Enter contribution information

- Select your **contribution period**.
- To edit a worksheet, locate the member's name by using **Previous Page** or **Next Page**, or by using the **Member Index**.
- **View Subtotal** provides a summary and contribution dollars subtotal for review.
- You can **Add New Member** and spousal information.
- Select **Save & Exit** to save the worksheet to draft, select **Save & Confirm** to review the worksheet summary and submit the contributions, or select **Cancel** to exit without saving.

New/Edit worksheet More information

For Payroll Division: 001
Contribution period: 24 Apr 2019 - 25 May 2019

Viewing: 11 to 20 of 40

Member number	Member name	RRSP Monthly Contribution	Employer Required	Member Voluntary Unmatched	Employer Voluntary Matched	Total
	SKTESTS, ATE5	0.00	0.00	0.00	0.00	0.00
	SCTES, MTE S	0.00	0.00	0.00	0.00	0.00
	ATEST, BTEST TH	0.00	0.00	0.00	0.00	0.00
	TTEST, VTESTR A	0.00	0.00	0.00	0.00	0.00
	PTESIT, MTES	0.00	0.00	0.00	0.00	0.00
	OTESIT, LTES	0.00	0.00	0.00	0.00	0.00
	LTESTES, DTEST	0.00	0.00	0.00	0.00	0.00
	YGTSTYGT, NVTEST	0.00	0.00	0.00	0.00	0.00
	TESTSURNAME, ATEST	0.00	0.00	0.00	0.00	0.00
	FTES, BNTE STBTEST	0.00	0.00	0.00	0.00	0.00
Page Total		0.00	0.00	0.00	0.00	0.00

Previous page: 000012345 - 533000022 Member Name: SKTESTS, ATE5
 Next page: Member Number: 000012345

View subtotals Save & exit Save & confirm Cancel

Step 5

New/edit worksheet summary

- Either return to continue to **Update worksheet**, **Submit** the set of contributions for payment, or **Exit** the worksheet to return to the **Contributions Submission** main page.

Sun Life Financial Help Contact us Profile Sign out

Home Group Retirement Services Reports Administration Investments Guides & Information Site map

Enter member contributions More information

New/Edit Worksheet Summary

Contribution Period: 24 Apr 2019 - 24 Oct 2019
 Client/Program:
 Payroll Division: 001
 Number Of Members:

	RRSP Monthly Contribution	Employer Required	Member Voluntary Unmatched	Employer Voluntary Matched	Total
Total	2,501.00	1,000.00	0.00	0.00	3,501.00

Note:

- **Exit** will save the contributions set in DRAFT mode, and return you to the Select Contribution Set Screen
- **Submit** will save the contributions set in DRAFT mode, and proceed to the Payments section.
- If you wish to transact at a later time, this can be done through the Payments function under **Service Centre**

Update worksheet Submit Exit

Step 6

Send a pre-authorized withdrawal

- Select **Submit** to send a payment. You can set up banking information through the **Add/change banking** option in the **Administration** dropdown menu, if available for your plan. Otherwise, please contact us to set up or change your banking information.

The screenshot shows the Sun Life Financial website interface. At the top, there is a navigation bar with links for Home, Group Retirement Services, Reports, Administration, Investments, Guides & Information, Site map, Help, Contact us, Profile, and Sign out. The main heading is "Submit a payment" with a sub-heading "Pre-Authorized Withdrawal" and a "More information" link. The page displays the following details:

Payment for:	Member Contributions
Client/Program:	
Payroll Division:	001
Contribution Period:	24 Apr 2019 - 24 Oct 2019
Total:	3501.00
Applied Forfeiture:	0.00
Amount for Pre-Authorized Withdrawal (PAW):	3501.00
Confirm Account:	Transit - Account

Note:

- Contributions received by 4 p.m. ET on a Sun Life Financial business day will purchase units based on the closing values of that day.
- Payments received by 4 p.m. ET on a Sun Life Financial business day will be processed the same day. Payments received after 4 p.m. ET, on a weekend or a holiday will be processed the next business day.

Select **Submit** to complete the request, or **Cancel** to exit without saving.

Buttons: View banking info, Apply forfeiture, Submit, Cancel

Step 7

Confirm your payment

- The **Confirmation** page will confirm that you have submitted your payment. Please print a copy of the page for your records.
- We will process payments submitted before 4 pm ET on the same business day.
- We will process payments submitted after 4 pm ET on the next business day.
- Contributions submitted before 4 pm ET will be based on the closing values of that day.
- Select **Exit** to return to the **Enter member contributions** page.

The screenshot shows the Sun Life Financial website interface. At the top, there is a navigation bar with links for Home, Group Retirement Services, Reports, Administration, Investments, Guides & Information, Site map, Help, Contact us, Profile, and Sign out. The main heading is "Submit a payment" with a sub-heading "Confirmation" and a "More information" link. The page displays the following details:

Thank you. Your payment has been submitted. Please print a copy of this confirmation for your records.

Payment For:	Member Contributions
Client/Program:	
Payroll Division:	001
Contribution Period:	24 Apr 2019 - 24 Oct 2019
Total:	3501.00
Amount for Pre-Authorized Withdrawal:	3501.00
From Account:	Transit - Account

Confirmation Number: on 24 Apr 2019 13:54:25 EDT
Effective: 24 Apr 2019

If there are any discrepancies between this confirmation and the amount debited from the bank account, please contact your Group Retirement Services Representative.

Button: Exit

You're done!

- Select **More information** to access an online user guide that walks you through the contribution process.

The screenshot shows the Sun Life Financial website interface. At the top, there is a navigation bar with links for Home, Group Retirement Services, Reports, Administration, Investments, Guides & Information, Site map, Help, Contact us, Profile, and Sign out. The main heading is "Enter member contributions" with a sub-heading "Select Contribution Set" and a "More information" link. The page displays the following details:

Input contributions directly into company plans. If you require help at any time, click on **More information**.

Step 1: Choose one of the following.

- Enter a new set of contributions
- Edit the draft set of contributions
- View a historical set of contributions.
- Create a printable document for a contribution set.

Step 2: Select the payroll division (if applicable), and the way you wish to sort your list of members.

Select a Payroll Division: 001
Sort List of Members By: Member Number

Step 3: Select the set of member contributions to enter or edit, then click **Continue**.

Contribution Period | Set Status | Confirmation = | Total \$

Button: Continue

Need assistance?

Please contact Sun Life's Sponsor Care Centre at **1-800-387-7262**, any business day from 8:30 am to 4:30 pm ET, or contact your Sun Life Group Retirement Services representative.